

Daily Market Recap

Friday, 8 August 2025

STOCK MARKET HIGHLIGHTS

NGX Statistics	07-Aug-25	08-Aug-25	Change %	YTD (%)
NGX All- Share Index	146,570.71	145,754.91	-0.56	41.61
Market Capitalization (N'Trn)	92.73	92.21	-0.56	46.92
Market Cap. (\$'Bn)	60.43	60.12	-0.51	
Total Value Traded (N'Bn)	27.24	32.42	19.02	
Total Value Traded (\$'Mn)	17.75	21.14	19.08	
Total Volume Traded (Mn)	1,982.99	2,215.77	11.74	
Number of Deals	35,282	35,023	-0.73	
Market Breadth	1.45x			

Sectors	07-Aug-25	08-Aug-25	Change%	YTD (%)
Banks	1,603.75	1,606.76	0.19	48.15%
Insurance	1,178.56	1,250.62	6.11	74.18%
Consumer Goods	3,223.58	3,222.79	-0.02	86.11%
Oil and Gas	2,431.71	2,440.83	0.38	-10.00%
Industrial Goods	5,582.89	5,497.12	-1.54	53.89%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
CHAMPION	13.10	14.41	1.31	10.00%
UNIONDICON	9.00	9.90	0.90	10.00%
UNIVINSURE	1.00	1.10	0.10	10.00%
GUINNESS	141.60	155.75	14.15	9.99%
MANSARD	13.31	14.64	1.33	9.99%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
ABBEYBDS	6.99	6.30	-0.69	-9.87%
CUSTODIAN	44.20	40.45	-3.75	-8.48%
DEAPCAP	1.46	1.35	-0.11	-7.53%
TIP	12.95	12.00	-0.95	-7.34%
NPFMCREFBK	3.45	3.20	-0.25	-7.25%

Source: NGX, SCM Capital Research

NASD OTC Snapshot

Statistics	07-Aug-25	08-Aug-25	Change %	YTD (%)
NSI	3,660.29	3,655.10	-0.14	21.73
Market Capitalization (N'Bn)	2,143.54	2,140.50	-0.14	107.92
Value Traded (N'000)	54,966.38	23,200.44	-57.79	
Volume Traded	1,577,649	485,742	-69.21	
Deals	40	17	-57.50	

Source: NASD, SCM Capital Research

Stock market reverse gains:

At the end of today's trading session, the equities market closed negative as the NGX-ASI moderated by 0.56% to 145,754.91 points. Consequently, year-to-date return decreased to 41.61%, while market capitalization declined by N516.14 billion to N92.21 trillion.

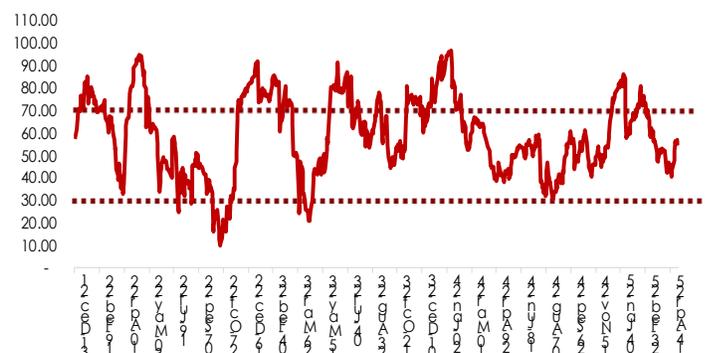
Having gained in four out of five trading sessions for the week, the benchmark index closed 3.18% higher week-on-week. Positive performances in MBENEFIT (+60.44% w/w), AIICO (+59.82% w/w), CORNERST (+54.46% w/w), GUINNESS (+33.06% w/w), BUAFODS (+18.93% w/w), BUACEMENT (+13.95% w/w), DANGCEM (+9.22% w/w), amongst others were able to offset losses in DANGSUGAR (-10.05% w/w), MTNN (-4.17% w/w), and WAPCO (-2.35% w/w).

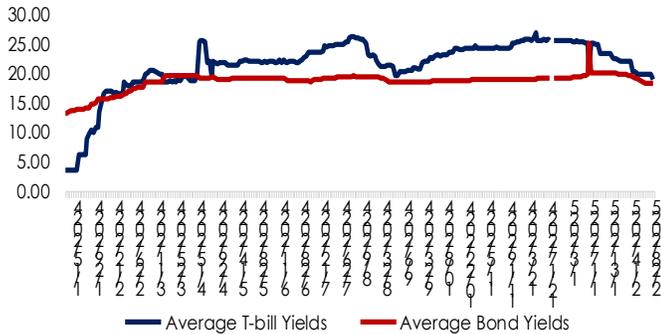
Activity level was mixed week-on-week, as volume traded rose by 80.24% to 8.76 billion units of shares traded, while value traded declined by 10.13% to N134.58 billion. For today, LINKASSURE (+9.57%) topped the volume chart with 585.56 million units, while DANGCEM (0.00%) led the value charts with 13.64 millions units of shares traded in deals worth N7.23 billion.

The market breadth (advance/decline ratio) improved from 1.29x to 1.45x, reflective of 42 gainers against 29 decliners.

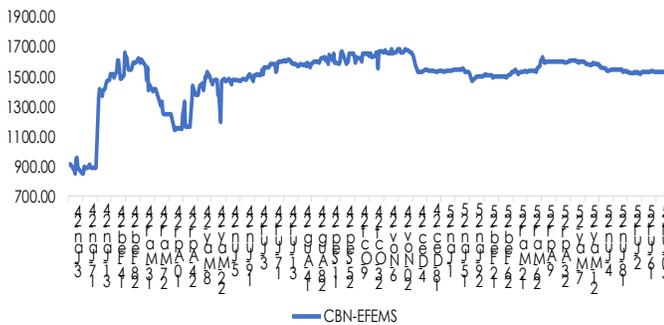
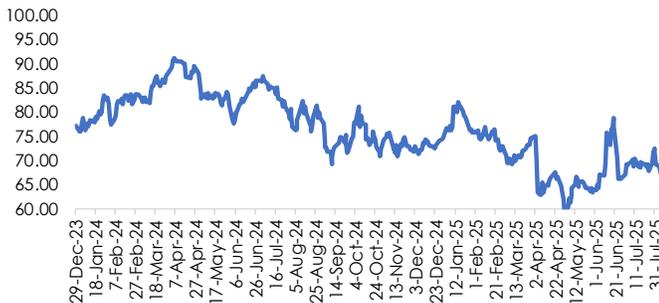
OUTLOOK

We expect mixed performance in the coming week.

RSI of NGX All Share Index


Fixed Income Yield Trend


Source: NGX, SCM Capital Research

Foreign Exchange Rates Trend

Brent Crude Oil Price

Fixed income market summary

T-bills	8-Aug-25	7-Aug-25	Change(bp)
3m	17.10	16.12	↑ 0.99
6m	18.46	17.78	↑ 0.68
12m	19.53	18.56	↑ 0.97

FGN Bonds	Current	Previous	Change(bp)
3yrs	16.87	16.87	→ 0.00
5yrs	17.02	17.02	→ 0.00
7yrs	17.06	17.06	→ 0.00
10yrs	15.56	15.56	→ 0.00

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	7.37	7.36	↑ 0.01
5yrs	8.04	8.01	↑ 0.03
7yrs	8.25	8.24	↑ 0.01
25yrs	9.67	9.64	↑ 0.03

FX	Current	Previous	Change(N)
CBN - EFEMS	1533.73	1534.44	↑ 0.71

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield rose by 14bps to settle at 18.06%. The O/N rate declined by 2bps to settle at 27.00%.

Fixed Income

At the secondary Bond market, yield closed flat at 16.28%.

Currency

The Naira appreciated by 0.05% at the EFEMS, to close at N1,533.73/USD.

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